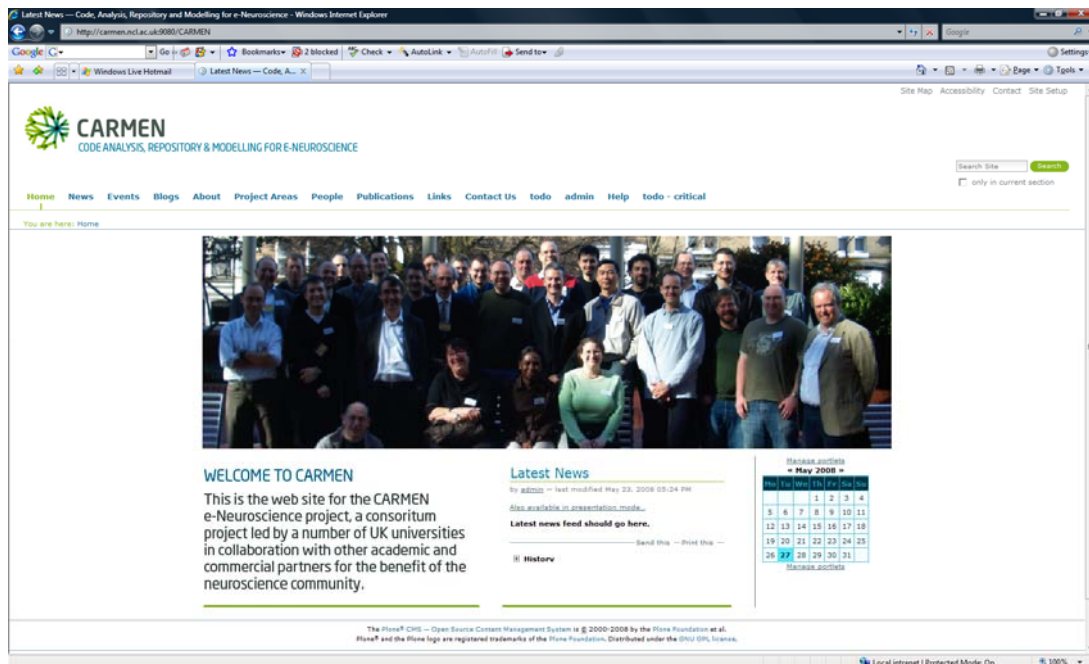












This manual is for website Administrators, Users and Visitors. The CARMEN website can be found at: <http://www.carmen.org.uk/>.

The website is powered by the Plone Content Management System (CMS). Further information on Plone can be found at: <http://www.plone.org/>.



This manual will explain:

-  The process of identifying your username and password 2
-  Editing site content 3
-  Publishing Content 5
-  Creating news/blog items 7
-  Viewing or creating events in the calendar 8
-  Adding/Viewing publications 10
-  Creating Links 12
-  Reviewing Content 13



1 The process of identifying your username and password

1.1 Users of the CARMEN project management system, ActiveCollab (http://carmen.ncl.ac.uk/project_management/), have User accounts for the CARMEN website. Your CARMEN website username will be *FirstnameLastnameActiveCollabUserKey*, e.g. AlastairKnowles18.

1.2 For simplicity, your username is also displayed on your user profile page, which can be found by visiting the people listing on the website:
<http://www.carmen.org.uk/people/> (people listing)
<http://www.carmen.org.uk/people/AlastairKnowles18> (User profile example)

1.3 Your password will be the same as it is for the CARMEN project management system.

1.4 Be aware that the website login is case sensitive. You must use capital letters where appropriate in your username and password.

| | | | | | | |
|----|----|----|----|----|----|----|
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | |

Log in

Login Name

Password

[Forgot your password?](#)

1.5 ActiveCollab synchronises with the website automatically. To alter your User profile information as it appears on the website, login to the project management system.

1.6 Website Administrators will have two User accounts. An account linked to ActiveCollab for management of their website profile, and a separate website administration account for access to website management functions.

1.7 Once you have logged into the website you can begin using the tools it provides.



2 Editing site content

2.1 Administrators can edit site content pages. The process is explained in this section.

2.2 Users can add items to listings such as news/blogs, events, publications and links. These processes are explained in subsequent sections.

2.3 We demonstrate how to edit the text that appears in the about section:
<http://www.carmen.org.uk/about/>.

2.4 The process is the same for all other static content pages, e.g. pages that contain flat HTML-type text, as opposed to listings that are generated from a database.

2.5 If you are logged in as an Administrator, you will be presented with a toolbar directly above the content containing an edit button.



2.6 Click the edit button. A standard form appears allowing you to edit the content.

2.7 The editing form provides a WYSIWYG (What You See Is What You Get) editor, providing point click document editing functions similar to a word processor.

2.8 Once you have finished editing content, click save, or cancel if you wish to discard your changes.



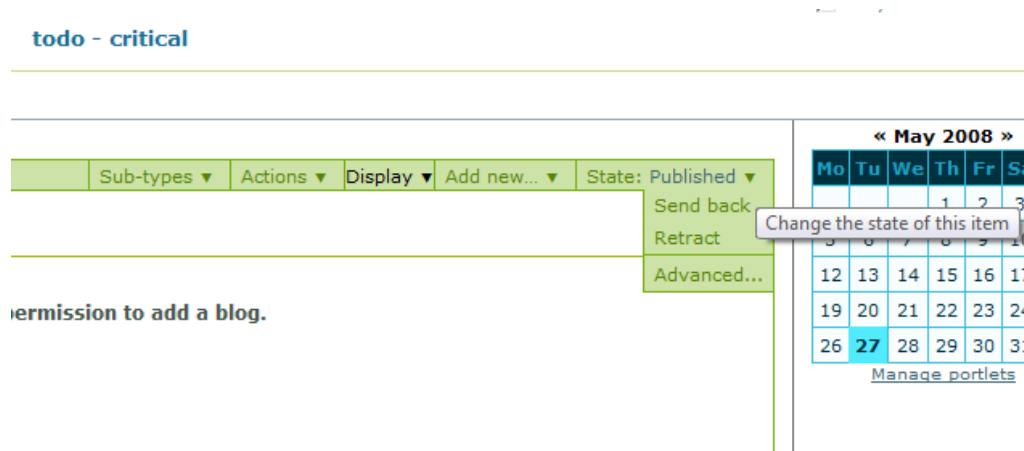


3 Publishing Content

3.1 When you create content or listing items (e.g. pages, news/blogs, events and links) their state may be set to “Private” by default. This has to be changed to publish items or to submit them for approval by an Administrator. Publications are an exception to this rule and can be created and published freely by Users.

3.2 Items are not visible to public website Visitors until they have been “Published”. The process of publishing items is the same for all content types.

3.3 When you have finished creating an item you will be presented with a confirmation page which includes a toolbar with the “State” menu on it.



3.4 If you create an item as a User you will have the option to “Submit for publication”. This alerts an Administrator that the item has been created and is pending approval. Your item will be approved and published or sent back to you for modification. Publications are an exception and can be created and published freely by Users.

3.5 As an Administrator you can skip the previous stage (3.4) and alter the status of your newly created item immediately to “Published” in the “State” menu.

3.6 The website also supports more granular publication settings which can be applied to all content items with the exception of publications.

3.7 Of these settings, the “Publication” and “Expiration” dates may be useful, as they allow time-windows to be specified during which items appear on the site.

3.8 To make use of these settings, click the “Dates” tab appearing on the confirmation page (refer to instructions 3.1, 3.2 and 3.3).

The screenshot shows the 'Edit Collection' interface with a green header bar containing tabs: Contents, View, Edit, Criteria, Subfolders, Rules, and Sharing. The 'Edit Collection' title is in blue. Below is an 'Info' box with a message: 'You are editing the default view of a container. If you wanted to edit the container itself, [go here](#).' Below this is a description: 'An automatically updated stored search that can be used to display items matching criteria you specify.' A row of tabs follows: Default (selected), Categorization, Dates, Ownership, and Settings. The 'Dates' tab is active, showing two sections: 'Publishing Date' and 'Expiration Date'. Each section has a text description and a date selection interface with dropdowns for year, month, and day. At the bottom are 'Save' and 'Cancel' buttons.

Contents View Edit Criteria Subfolders Rules Sharing

Edit Collection

Info You are editing the default view of a container. If you wanted to edit the container itself, [go here](#).

An automatically updated stored search that can be used to display items matching criteria you specify.

Default Categorization **Dates** Ownership Settings

Publishing Date
If this date is in the future, the content will not show up in listings and searches until this date.
2008 / -- / --

Expiration Date
When this date is reached, the content will no longer be visible in listings and searches.
2008 / -- / --

Save Cancel



4 Creating news/blog items

4.1 News and blog type items may be added to the news listing:

<http://www.carmen.org.uk/news/>.

4.2 As a User or Administrator, select “Add News Item” in the toolbar directly above the news listing. “Add News Item” may appear under the “Add New” menu.



4.3 A standard form appears allowing you to enter the item. Complete this form as described in section 2. You should enter a summary of your item in the description field as this is displayed on summary listings and in RSS feeds.

Title

CARMEN USERGUIDE RELEASE

Description
A short summary of the content.
This article is about the release of the CARMEN userguide.

Body Text

The userguide will hopefully tell you how to use the website.

☐ **Limit Search Results**
If selected, only the 'Number of Items' indicated below will be displayed.

Number of Items

0

☐ **Display as Table**
Columns in the table are controlled by 'Table Columns' below.

Table Columns
Select which fields to display when 'Display as Table' is checked.

| | | |
|-----------------|--|--|
| Creation Date | | |
| Creator | | |
| Description | | |
| Effective Date | | |
| End Date | | |
| Expiration Date | | |

Save **Cancel**

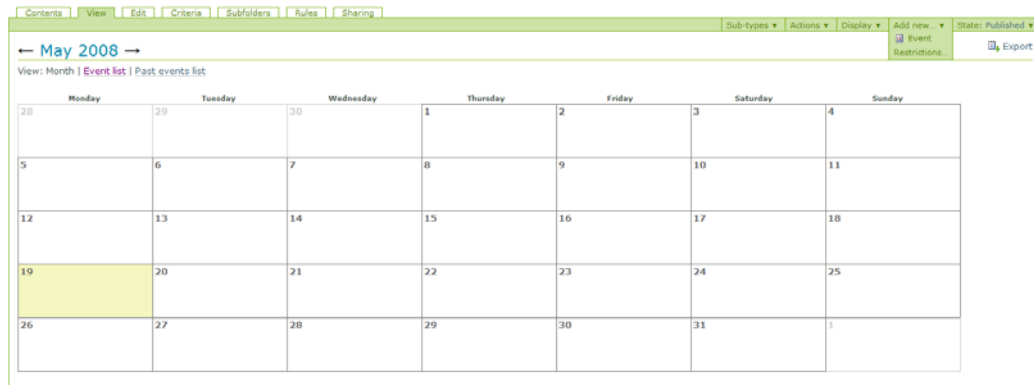
4.4 Follow the publication process described in section 3.

4.5 An RSS feed can be generated by following the link at the bottom of the news listing.
For more information on RSS feeds read the following: <http://www.whatissrss.com/>.

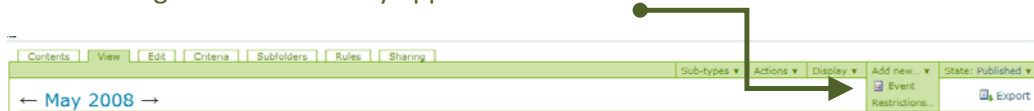


5 Viewing or creating events in the calendar

5.1 Event items may be added to the events listing: <http://www.carmen.org.uk/events/>.



5.2 As a User or Administrator, select “Add Event” in the toolbar directly above the events listing. “Add Event” may appear under the “Add New” menu.



5.3 A standard form appears allowing you to enter the event item. Complete this form as described in section 2.

Add Event

Information about an upcoming event, which can be displayed in the calendar.

Default
Categorization
Dates
Ownership
Settings

Title

Description
A short summary of the content.

Event Location

Event Starts
2008 / May / 29 09 : 30

Event Ends
2008 / May / 29 09 : 30

Event body text

B
I
List
Link
Image
Video
Audio
Code
Normal paragraph

Attendees

Event Type(s)

Existing categories

New categories

Event URL
Web address with more info about the event. Add http:// for external links.

Contact Name

Contact E-mail

Contact Phone

Change note
Enter a comment that describes the changes you made.

Save
Cancel

5.4 Follow the publication process described in section 3.

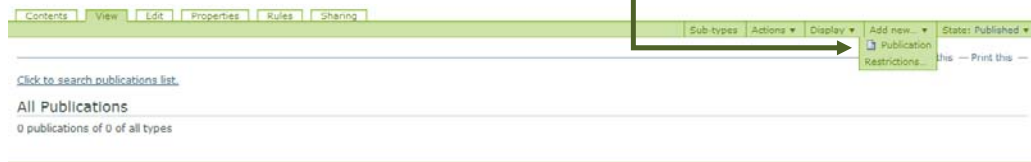


6 Adding/Viewing publications

6.1 Publication items may be added to the publications listing:

<http://www.carmen.org.uk/publications/>.

6.2 As a User or Administrator, select “Add Publication” in the toolbar directly above the publications listing. “Add Publication” may appear under the “Add New” menu.



6.3 A standard form appears allowing you to enter the publication. Complete this form as described in section 2.

Add Publication
Publication that was published as a book.

Default Metadata

Title

Publication Title

Author(s), one per line

Book, journal or conference title

Chapter or volume number if any

Page count

Page start point

Page end point

Details - e.g. conference location

ISBN

Publisher

Day

Month (1..12)

Year

Type of publication

Book

External URL

External URL of paper

Link to PDF

Select a PDF

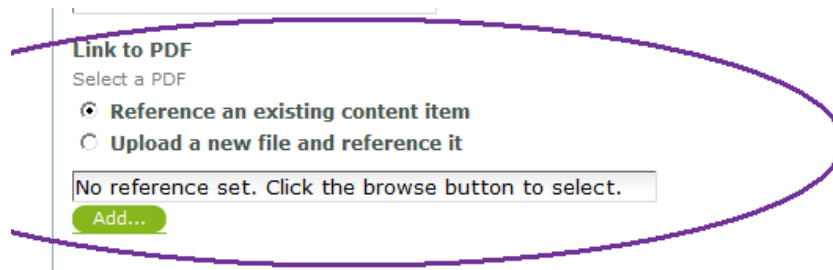
☒ Reference an existing content item

☐ Upload a new file and reference it

No reference set. Click the browse button to select.

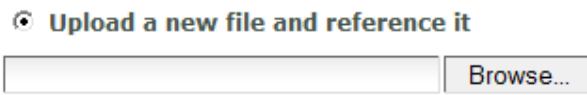
Save Cancel

6.4 You can link a publication hosted on an existing webpage by selecting the “Reference an existing content item” option. To upload a completely new publication, select the second option. This works in the same way as attaching a document to an email ...



The screenshot shows a web form titled "Link to PDF" with the subtitle "Select a PDF". There are two radio button options: "Reference an existing content item" (which is selected) and "Upload a new file and reference it". Below the options is a text box containing the message "No reference set. Click the browse button to select." and a green "Add..." button. A purple oval is drawn around the entire form area.

6.5 ... Click browse to upload a file from your computer.



The screenshot shows the "Upload a new file and reference it" radio button option selected. Below it is a text input field and a "Browse..." button.

6.6 Once you have linked and saved your publication, follow the publication process described in section 3.

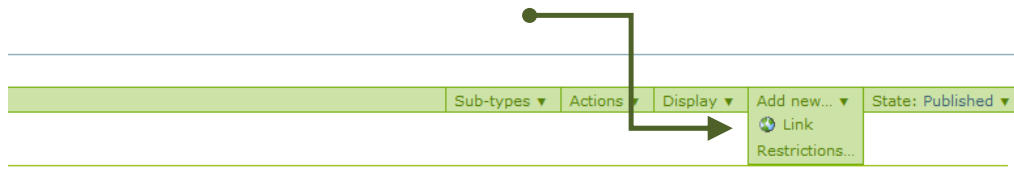


7 Creating Links

7.1 Users and Administrators can create link items on the links page:

<http://www.carmen.org.uk/links/>. Link items are hyperlinks to other website pages that project members may find useful.

7.2 As a User or Administrator, select “Add Link” in the toolbar directly above the events listing. “Add Link” may appear under the “Add New” menu.



7.3 You will be asked to name, describe and enter the URL of the link.

7.4 When you have done this select save.

7.5 Follow the publication process described in section 3.



8 Reviewing Content

8.1 Administrators must review some items created by Users before publication.

8.2 A review list is displayed to Administrators to the bottom right of the page template.

| | | | | | | |
|----|----|----|----|----|----|----|
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | |

Review List
 Testing Publication Workflow
 Alastair Knowles18 — May
 30, 2008
[Full review list...](#)

8.3 Items can be reviewed individually by following the related links. The options to “Publish”, “Send Back”, or “Retract” are presented in the “State” menu.

| | | | | | | |
|---|------|---------|---------|-----------|-----------|--|
| View | Edit | Sharing | History | Sub-types | Actions ▼ | State: Pending review ▼ |
| Testing Publication Workflow by Alastair Knowles — last modified May 30, 2008 12:58 AM Testing publication workflow Testing publication workflow | | | | | | Publish Send back Retract Advanced... |

8.4 By following the “full review list” link instead (refer to 8.1), multiple items can be reviewed in the same step.

For queries or suggestions relating to this manual please contact
alastair.knowles@ncl.ac.uk or suzanne.carlton@ncl.ac.uk.